

# Attachment 5

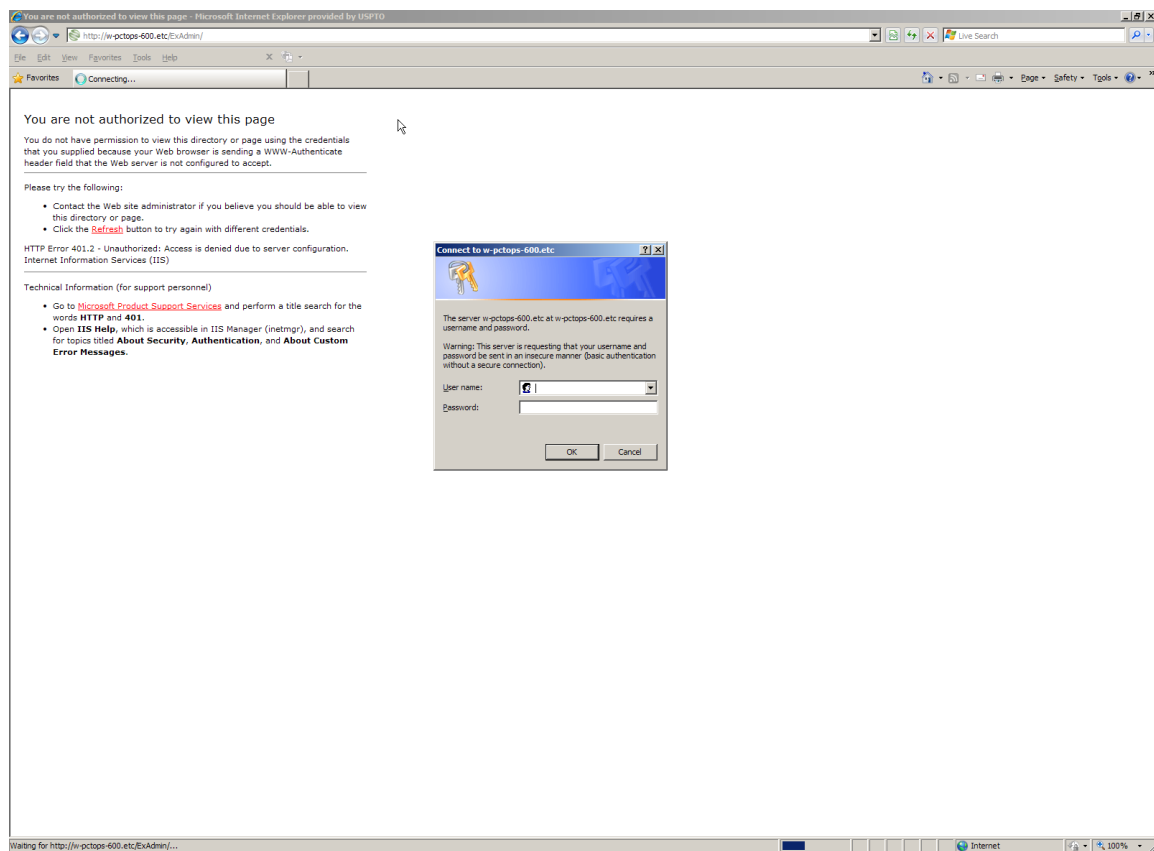
## Training Material

### Global 360 Administration

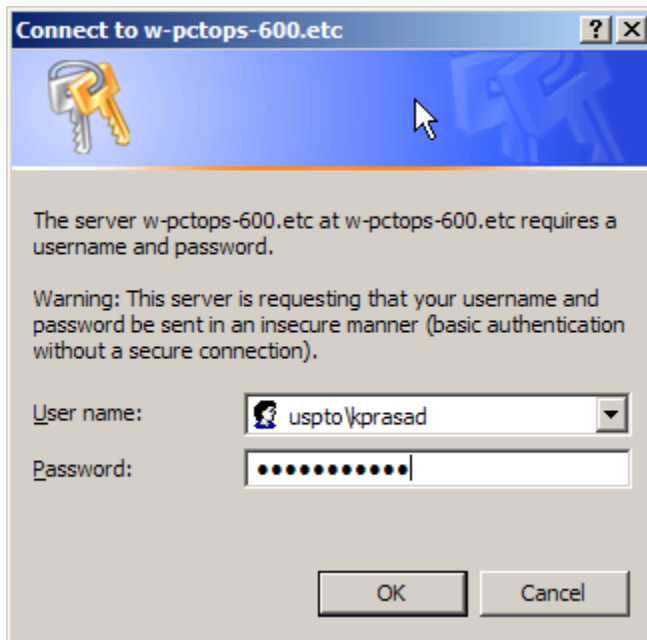
### Web-Based POWER Workflow System Console

1. Double-click the following URL to access the new web-based System Admin Console: <http://w-power-12/ExAdmin/>. The following log-on screen will be displayed.

*(The production URL will be provided to all the Supervisors in PCT Ops and PCT Legal).*

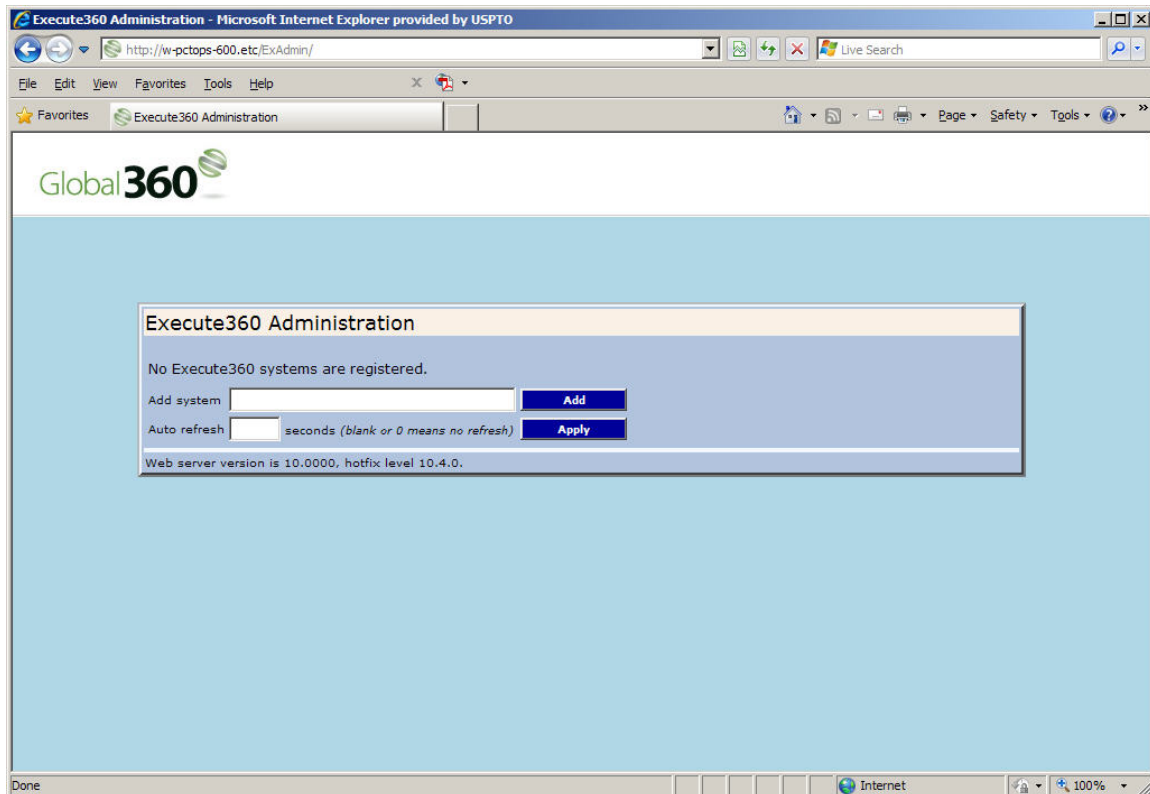


2. Please enter your USPTO Domain Logon information. You must pre-fix “uspto\” in front of your login name.

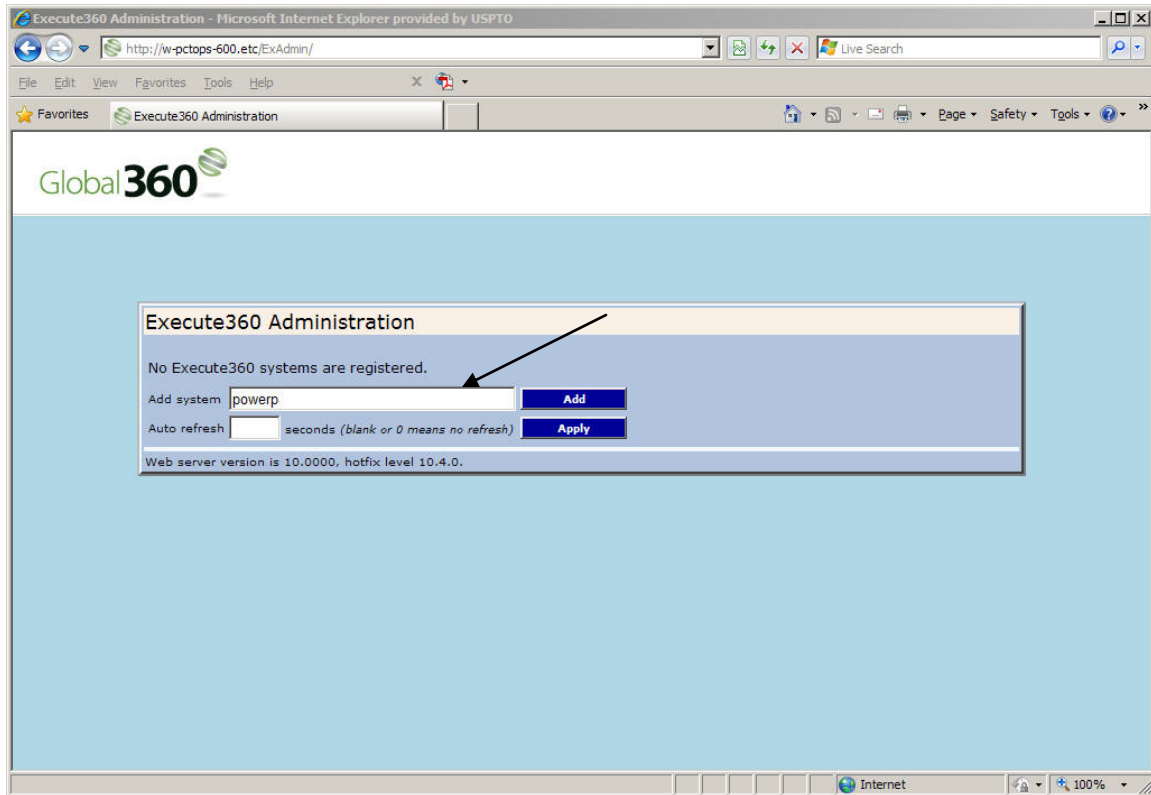


3. Execute 360 Admin Page is displayed, as shown below.

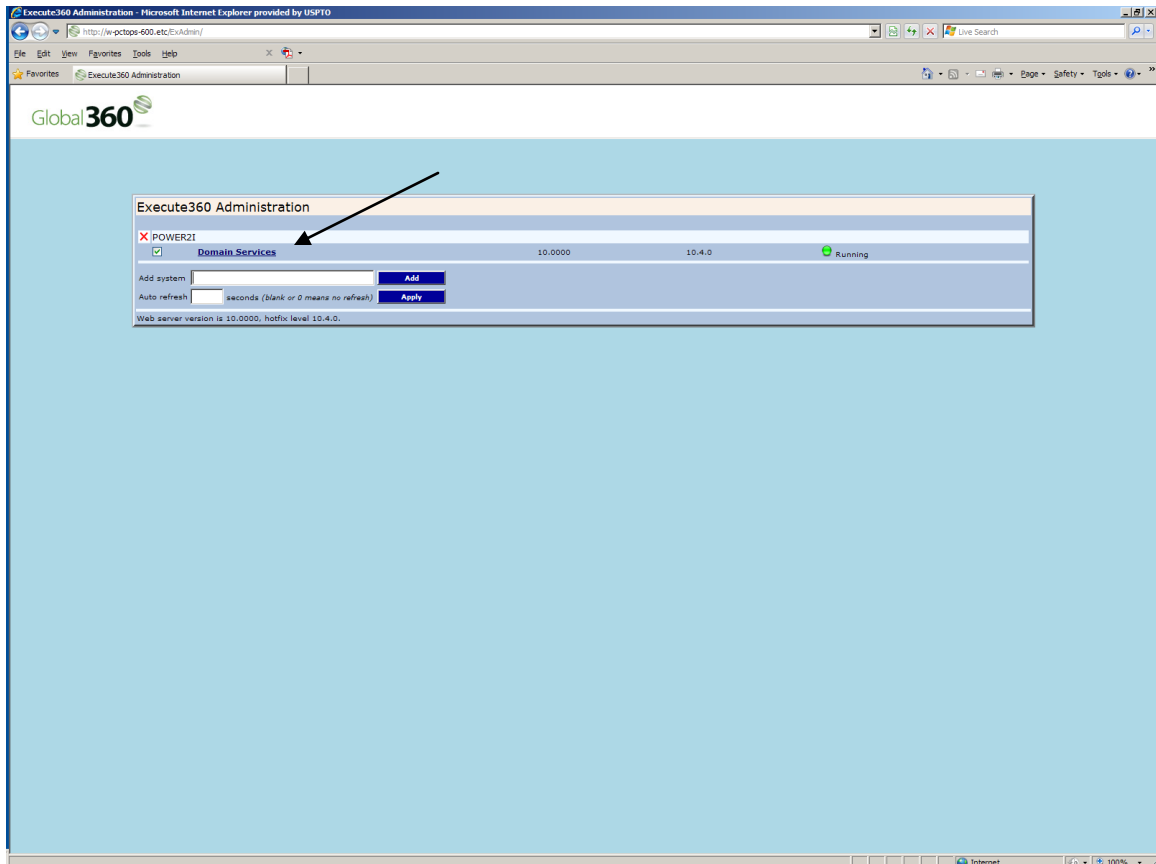
*Note: When you log onto the Executive 360 Administration system next time, the system may not require Step 3 and Step 4 if the system still remembers your previous registration. In that case, continue to the next step.*



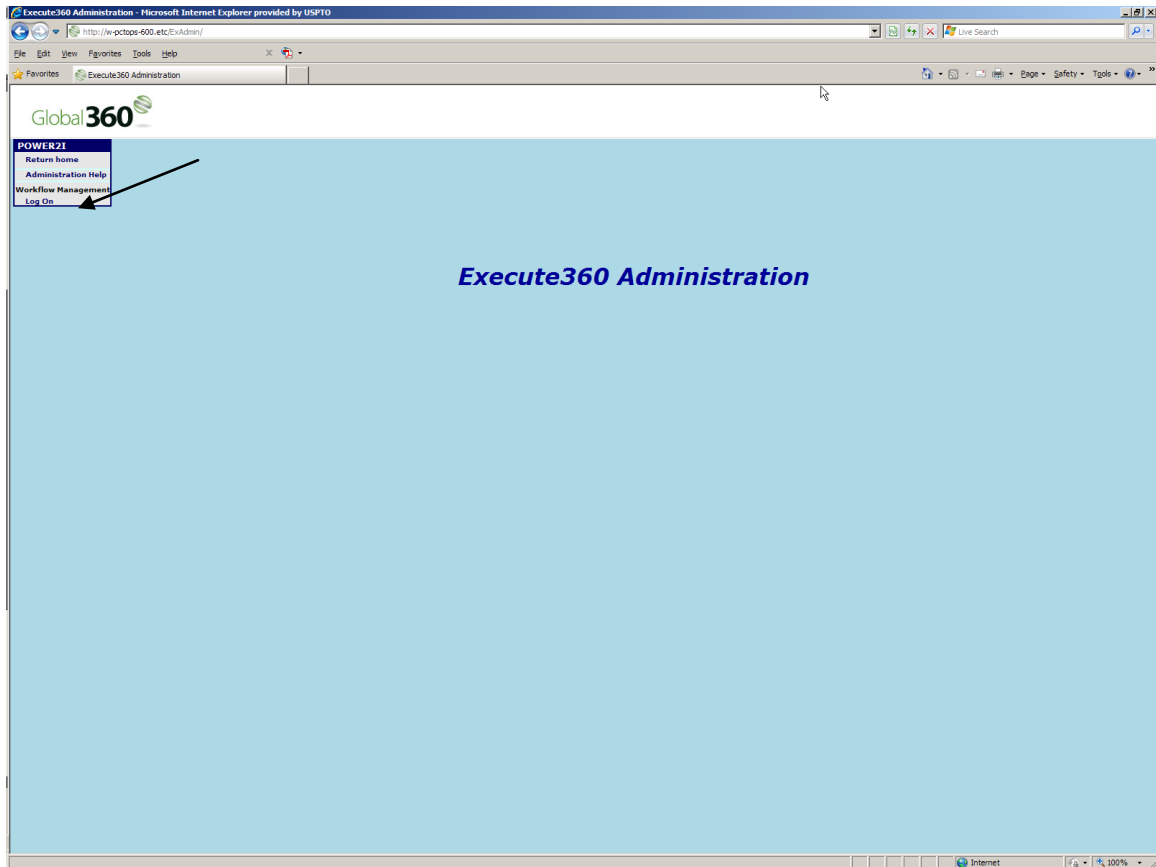
4. Add “powerp” to the system as shown below and click “Add”.



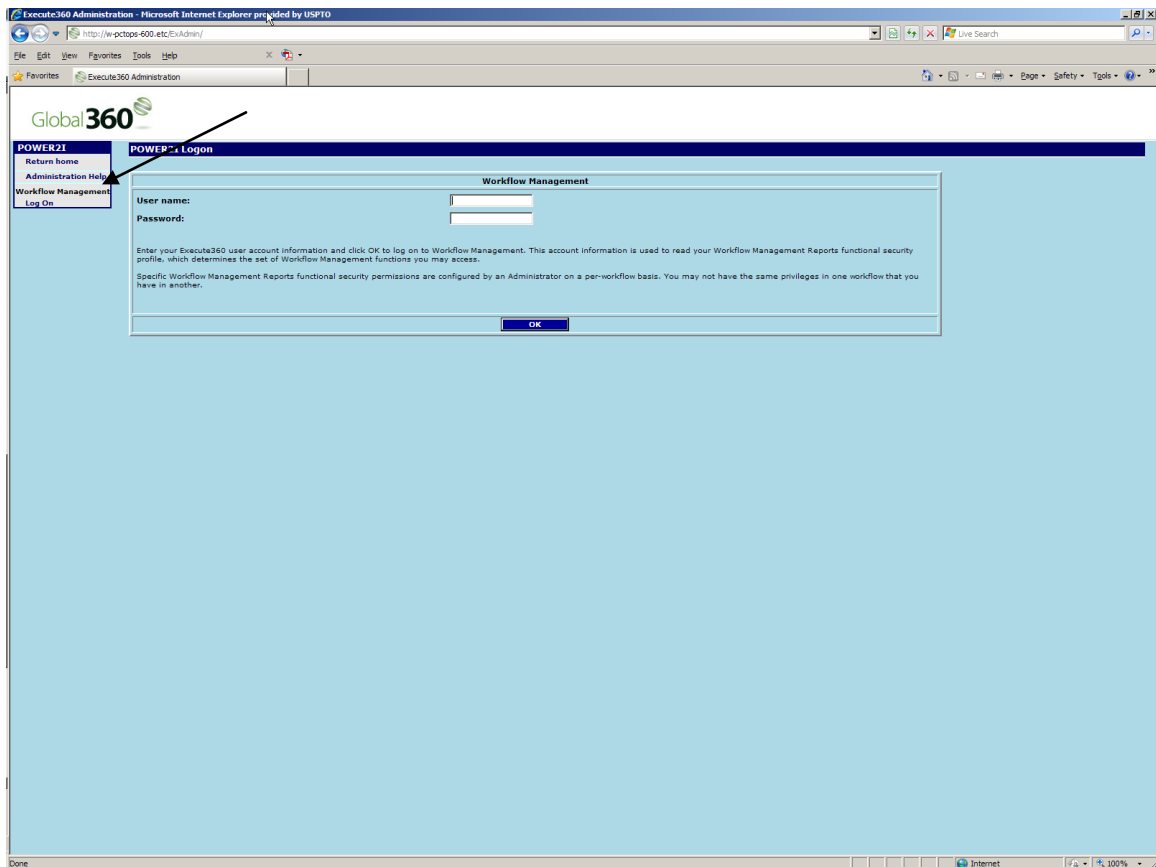
5. Execute 360 “powerp” domain is registered. Click on “Domain Services” Link



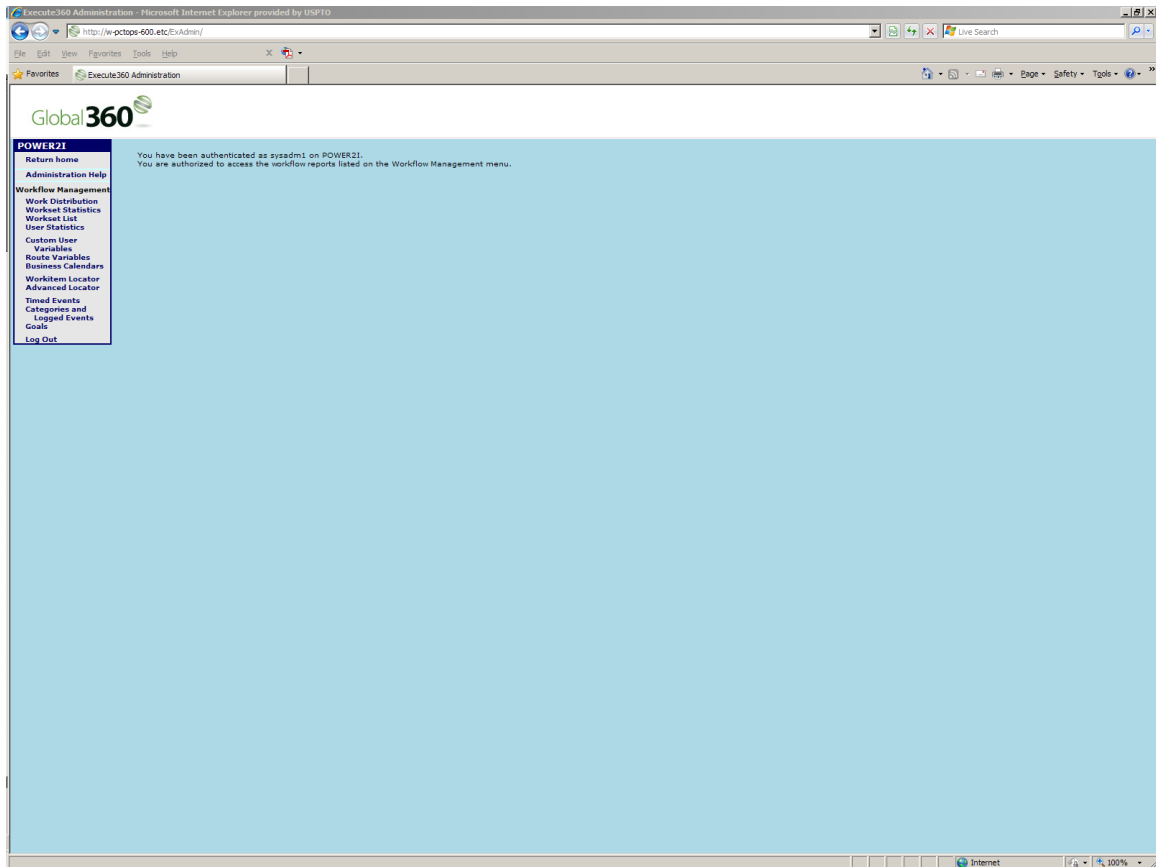
6. The following “Executive 360 Administration home page will be displayed. Click the Log On menu item to log on to the system admin console.



- Click on “Workflow Management” on the left navigation menu. Please enter your Username and Password used to logon to the current system admin console and click “OK”.



8. You will be authenticated and the Workflow Management Options will be listed.





- Click on “Work Distribution” to list the full Worksteps. NOTE: With this web-based system admin console, you can easily sort each column data by simply clicking the column header.

The screenshot shows the Global360 Administration web console. The main content area is titled "Work Distribution" and displays a table of worksteps. The table has the following columns: Workstep, Server, Item Count, Items in Error, Items Completed, Last Item Added, and Total Child Count. The table lists various worksteps such as 16th Exceptions, 19.4 Exceptions, ArchiveLog120, ArchiveLog240, ArchiveLog360, Article 11, Backlog1, Backlog2, Bib Data Review, CSM Backlog, Copies & Mailing, Demand Backlog, Demand LSS Backlog, Demand LSS1, Demand Over Backlog, Demand Overdue resp, Demands1, Done Processing, Exception Processing, Exit Legal, FOSC, FOSC LSS, Hold, Hold LSS, IB Correspondence, IB1313, Join, Join2, L&R HOLD, L&R Hold Backlog, Legal Advice, Legal QA, LIE, LIE Backlog, LSS, LSS Backlog, Manual Review, ManualReview Backlog, Misc, Other Exceptions, Overdue, PCT Legal, Petitions, Post PICS ACRS, Purge workflow, Reassign, and Rectifications. The table is sorted by Item Count in descending order.

Workstep	Server	Item Count	Items in Error	Items Completed	Last Item Added	Total Child Count
16th Exceptions	power/21	5	0	0	2011-01-07 14:02:25	0
19.4 Exceptions	power/21	11	0	0	2009-08-29 09:40:51	0
ArchiveLog120	power/21	6	0	0	2011-01-12 10:55:54	0
ArchiveLog240	power/21	6	0	0	2010-12-08 13:32:36	0
ArchiveLog360	power/21	2	0	0	2009-02-21 16:00:33	0
Article 11	power/21	2	0	0	2002-05-23 17:54:24	0
Backlog1	power/21	2	0	0	2009-03-18 13:20:48	0
Backlog2	power/21	0	0	0		0
Bib Data Review	power/21	833	0	0	2011-01-12 14:44:06	0
CSM Backlog	power/21	0	0	0		0
Copies & Mailing	power/21	93	0	0	2010-11-11 11:22:02	0
Demand Backlog	power/21	0	0	0		0
Demand LSS Backlog	power/21	0	0	0		0
Demand LSS1	power/21	44	1	0	2010-10-22 12:15:21	0
Demand Over Backlog	power/21	0	0	0		0
Demand Overdue resp	power/21	1085	1	0	2010-03-04 15:16:27	0
Demands1	power/21	388	0	0	2011-01-12 14:45:03	0
Done Processing	power/21	83	0	0	2011-01-13 12:56:17	0
Exception Processing	power/21	370	2	0	2011-01-11 11:14:53	0
Exit Legal	power/21	7	1	0	2002-10-21 09:42:13	0
FOSC	power/21	17	0	0	2011-01-12 10:54:02	0
FOSC LSS	power/21	12	0	0	2008-08-29 18:41:53	0
Hold	power/21	54	0	0	2007-08-03 17:02:07	0
Hold LSS	power/21	70	1	0	2009-11-04 15:46:17	0
IB Correspondence	power/21	0	0	0		0
IB1313	power/21	18	0	0	2008-08-04 21:08:56	0
Join	power/21	0	0	0		0
Join2	power/21	0	0	0		0
L&R HOLD	power/21	198	0	0	2011-01-10 11:47:31	0
L&R Hold Backlog	power/21	1	0	0	2004-11-04 13:11:42	0
Legal Advice	power/21	14	0	0	2006-04-21 12:13:24	0
Legal QA	power/21	41	0	0	2001-12-21 12:52:44	0
LIE	power/21	23	0	0	2007-08-03 17:03:40	0
LIE Backlog	power/21	0	0	0		0
LSS	power/21	103	0	0	2011-01-12 10:54:54	0
LSS Backlog	power/21	0	0	0		0
Manual Review	power/21	167	7	0	2010-12-09 14:08:17	0
ManualReview Backlog	power/21	0	0	0		0
Misc	power/21	56	0	0	2006-04-21 15:16:11	0
Other Exceptions	power/21	0	0	0		0
Overdue	power/21	11332	0	0	2009-11-29 07:02:27	0
PCT Legal	power/21	0	0	0		0
Petitions	power/21	37	0	0	2006-04-21 14:02:42	0
Post PICS ACRS	power/21	2	0	0	2009-12-01 17:50:04	0
Purge workflow	power/21	0	0	0		0
Reassign	power/21	3	0	0	2003-09-30 16:03:02	0
Rectifications	power/21	11	0	0	2004-01-16 12:17:23	0

10. You can administer a Workstep from this web page. For example,
  - a. Identify a work-step you want to manage.
  - b. Double click on the Workstep to display the Workstep Contents list.
  - c. Select Applications to “Assign to User” or “Release from User”.

The screenshot shows the Global360 Administration web interface. The main content area displays the 'Contents of workstep 19.4 Exceptions in workflow POWER20 on server power21'. A filter section at the top allows setting a filter on a column (currently 'No Filter') and applying it. Below the filter is a table of work items with columns: Name, Internal Name, Type, Workstep Entry Time, Current User, Lock Status, Lock Time, Work Status, Class, Associated User, Error Code, and Error Comment. The table lists 11 items, with the first item selected. Below the table, there are buttons for 'Release from user', 'Remove from workflow', 'Release from error and', 'Move to', and 'Assign to user'. The 'Assign to user' button is highlighted, showing a dropdown menu with 'ABASTOLA' selected.

### How to use the Filter function?

If you want to filter the contents of the selected Workstep with a certain condition, you can use the Filter block, as shown in the following example.

Suppose you are interested in US05 applications only, then

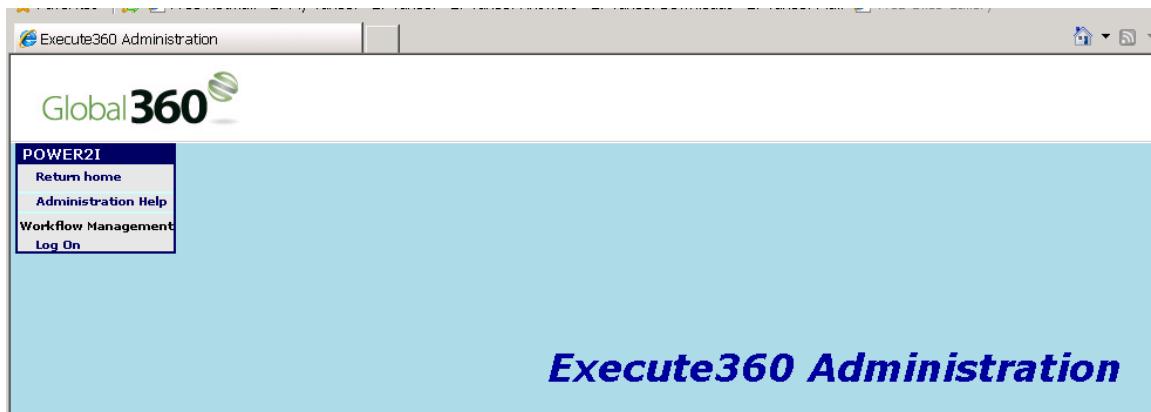
- i. Select “Workitem Name” from the “Set filter on column” list.
- ii. Enter “US05” in the containing field, which is *case-sensitive*.
- iii. Click “Apply”.

Refer to the following screen for the filtering parameters used and its result set.



12. Difference between “Return Home” option and “Log Out” option.

- a. **Log Out** – Allow you to log out from the System Admin Console but you are still connected to the powerp system. With this option, you can easily log back into the system admin console, same as Step 7. Below is the screenshot after the Log Out option is selected.



- b. **Return Home** – Same as the Log Out option but you will need to start from Step 5 if you want to log back into the system again. Below is the screenshot after the Return Home option is selected.

